



Clean Energy Upgrade Financing Program - Quick Reference¹

Requirements differ based upon borrower participation in utility rebate programs.

Follow the applicable pathway below according to program participation and the type of utility.

Energy Efficiency Retrofits

Borrower is:	Participating in an Investor-Owned Utility (IOU) Whole House Program²	Participating in a Publicly Owned Utility (POU) Whole House Program	Performing Retrofits Outside of a Utility Rebate Program (Other)
Eligible Improvements	Selected in Accordance with an IOU Whole House Energy Efficiency Program	Recommended by Home Energy Rating System (HERS) or Building Performance Institute (BPI) Pre-Project Assessment to Achieve Minimum 10% Total Energy Savings	Recommended by Home Energy Rating System (HERS) or Building Performance Institute (BPI) Pre-Project Assessment to Achieve Minimum 10% Total Energy Savings
Contractor Qualifications (in addition to legally required licenses)	IOU Program Approval Requirements	BPI Certified	BPI Certified
Post-Project Assessment Quality Assurance	Performed in Accordance with IOU Program Quality Assurance Protocols	Performed in Accordance with "Home Performance with ENERGY STAR" Program Guidelines	Performed Under HERS or BPI Standards by an Independent Third-Party Inspector
Documents Required with Loan Enrollment Application	-Pre-Project Assessment -Certificate of Completion -Post-Project Assessment -Utility's Post-Retrofit Approval	-Pre-Project Assessment -Certificate of Completion -Post-Project Assessment -Utility's Post-Retrofit Approval	-Pre-Project Assessment -Certificate of Completion -Post-Project Assessment

Distributed Generation Installations³

Program	IOU Whole House Program²	POU Whole House Program/Other
Eligibility of Distributed Generation (Loading Order)	Installation of Eligible Improvements in Accordance with an IOU Whole House Energy Efficiency Program	Installation of Eligible Improvements Achieving at Least 10% Total Energy Savings as Described Above
	—OR— Homes with a HERS Score of 85 or Lower Are Only Required to Perform Energy Efficiency Measures If Recommended in a Pre-Project Assessment	
Additional Contractor Qualifications	A, B, C-4, C-10, C-36, or C-46 License from California Contractors State License Board	
Additional Documents Required	Utility Interconnection Letter	

¹ Refer to California Code of Regulations Title 4, §§10050-10060 for full program rules and requirements.

² IOU Program must be approved by the California Public Utilities Commission.

³ e.g. Photovoltaic Solar Panels